

# Refunds Policy

*November 2021*

## ***Strategic objectives***

- *Improving provision*
- *Raising awareness*
- *Creating a community*
- *Empowering young people*
- *Strengthening our sustainability and effectiveness*

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## 1. Overview / Purpose

Potential Plus UK is an educational charity that supports parents/carers, educationalists and other professionals to understand and meet the educational and wellbeing needs of young people with high learning potential up to the age of 18. In order to achieve this, the charity provides a wide range of services, products and events.

A Refunds Policy is required to clearly explain the guidelines that the charity should adhere to with regards to:

- The sale of its services, products and events
- The circumstances for refunds
- The actions required by staff to meet the guidelines of this policy.

## 2. Scope

This policy informs the actions required by Potential Plus UK staff to adhere to its guidelines, as well as setting out the expectations for its service users and customers. All employees must read the policy and it must also be available to all service users and customers before any payment is made.

## 3. Policy

- All costs generated in the sale of the charity's services, products and events should be covered when any of these is cancelled by a service user and a refund requested,
- A full refund or an alternative booking should be offered to service users in the event that the charity needs to cancel a service, product or event
- The criteria of the Refunds Policy are guided by and adhere to all legal requirements including the Consumer Contracts Regulations 2013 and the Consumer Rights Act 2015.
- The Refunds Policy is publicly available on Potential Plus UK's two websites <https://potentialplusuk.org> and <https://community.potentialplusuk.org>; the details are provided to service users and customers before any payment is taken.
- Service users and customers are required to agree to the Terms and Conditions of Sale.
- The trustees recognise that there may be circumstances when a more lenient approach is required and appropriate.

## 4. Monitoring and Reporting

- All written requests for refunds are handled by The Finance Manager and saved in the Private\_Finance folder, together with actions taken.
- All refunds are authorised by the Chief Executive.
- The Chief Executive reviews the refunds monthly.
- The Chief Executive reports to the Executive Committee and/or full board every two months.

## 5. Roles and Responsibilities

- All trustees are responsible for creating and reviewing this policy.
- All trustees, but most specifically the Executive Committee, are responsible for reviewing the application of the policy and making any necessary strategic decisions.
- The Chief Executive is responsible for the procedural Terms and Conditions that accompany this policy and their implementation by the charity's employees.
- The Finance Manager is responsible for the accurate recording required by this policy.

## 6. Related Standards, Policies and Processes

Potential Plus UK's Terms and Conditions of Sale

## 7. Revision History

List all changes made to the document including version number, date approved etc. using the below table.

Version:	Date Approved:	Approved by:	Owner:	Author:	Summary of Change:	Review Date:
20211130	30/11/2021	Board of Trustees	Board of Trustees	Chair Steve Ramsden & CEO Julie Taplin	Separation of policy and T&C of Sale	November 2024